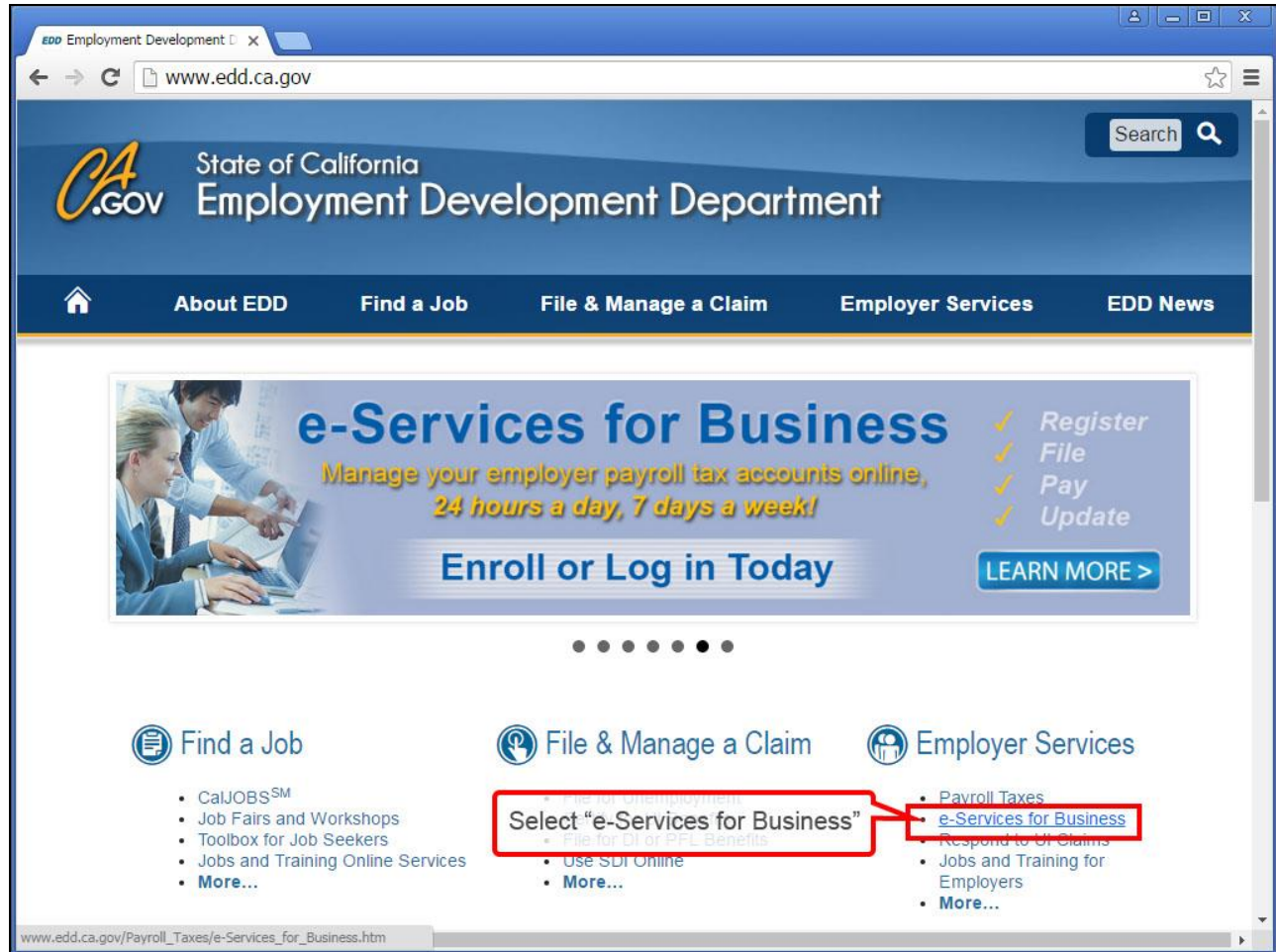


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# I Want to Enroll as an Agent and Add Access to Accounts in e-Services for Business

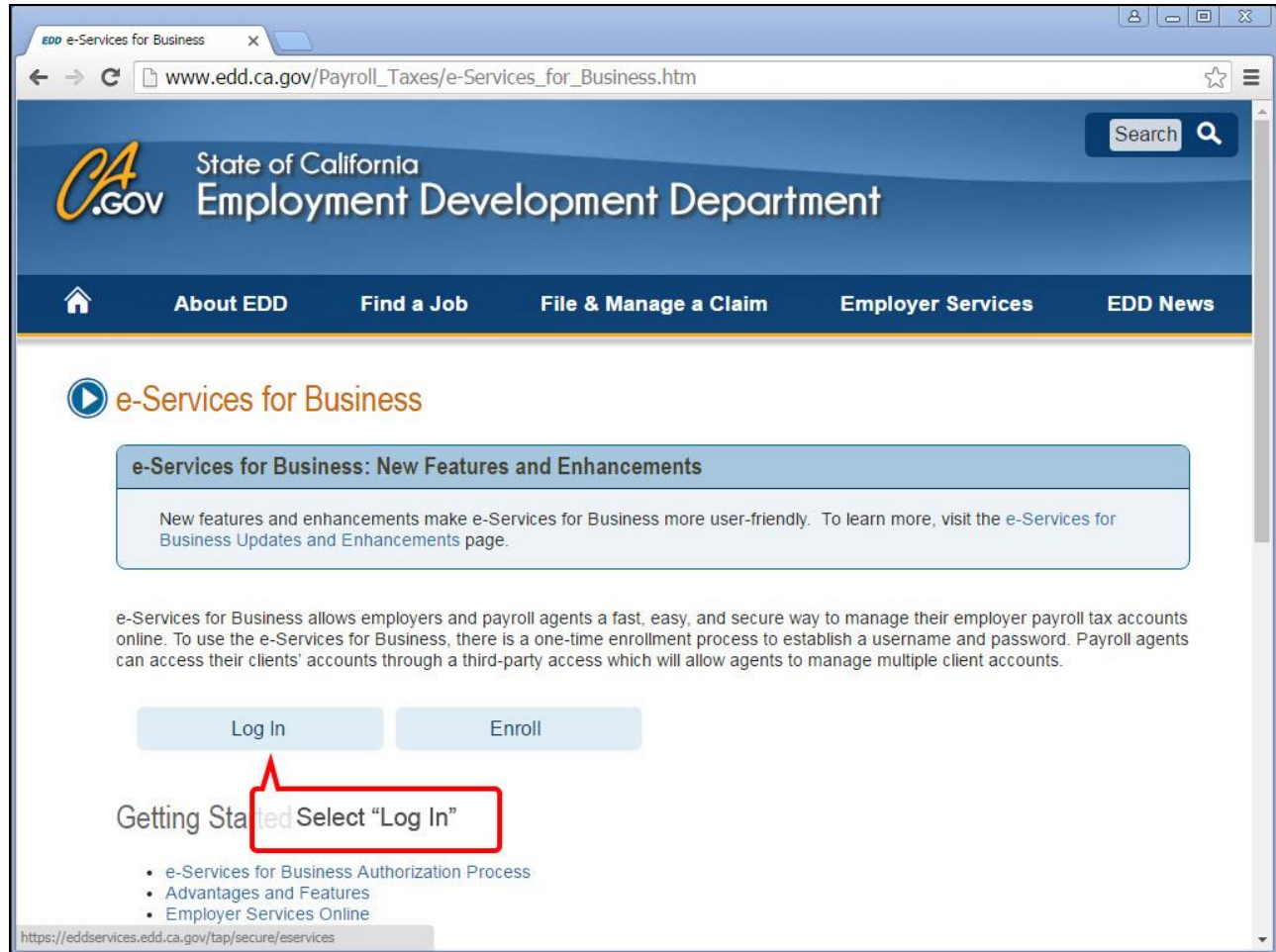
## Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to complete a one-time enrollment process as an employer representative/payroll agent and how to access a client's account in e-Services for Business.



### Slide notes

Welcome to the Employment Development Department home page. Notice the “e-Services for Business” hyperlink in the Employer Services column. Select the “e-Services for Business” hyperlink.



## Slide notes

Select the e-Services for Business “Log In” button.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov/tap/secure/eservices>. The page header features the CA.Gov logo and the text "State of California Employment Development Department". A navigation bar includes a home icon, "My Profile", and "Employer Services Online". The main content area is titled "Employer Services Online" with a play button icon. Below this, a paragraph states: "Employer Services Online allows you to access e-Services for Business, eWOTC, or SIDES E-Response (coming soon). If you are a new user, you must first complete a one-time enrollment process." The "Login" section contains two input fields: "Username:" and "Password:". To the right of the "Username:" field is a link "Forgot username?". To the right of the "Password:" field is a link "Forgot password?". Below the password field is a note: "Note: Password is case-sensitive." A "Login" button is positioned below the note. The "New User" section includes a link: "Enroll for a username and password to access Employer Services Online."

### Slide notes

You should already have a username and password established. Enter your username and password. If you would like to learn how to enroll for a username and password refer to the tutorial "I Want to Enroll for a Username and Password to Use e-Services for Business."

EDD Employer Services Online

https://eddservices.edd.ca.gov/tap/secure/eservices

My Profile

CA.Gov State of California Employment Development Department

Home My Profile Employer Services Online

### Employer Services Online

Employer Services Online allows you to access e-Services for Business, eWOTC, or SIDES E-Response (coming soon). If you are a new user, you must first complete a one-time enrollment process.

#### Login

Username:  [Forgot username?](#)

Password:  [Forgot password?](#)

Note: Password is case-sensitive.

**Select "Login"**

#### New User

[Enroll for a username and password to access Employer Services Online.](#)

### Slide notes

Select "Login" to begin using e-Services for Business.

The screenshot shows the 'e-Services for Business' enrollment page for the State of California Employment Development Department. The page is titled 'Welcome to e-Services for Business'. It features two main sections: 'Select Existing Customer if you are any one of the following:' and 'Select New Customer if you are:'. The 'Existing Customer' section lists three criteria: being an employer with a payroll tax account number, an employer representative/payroll agent, or an individual/business reporting independent contractors. The 'New Customer' section lists one criterion: being an employer needing to register for a payroll tax account number, with a note not to select this option if you are an employer representative or payroll agent. To the right of these sections are two buttons: 'Existing Customer' and 'New Customer'. A red callout box points to the 'Existing Customer' button, and a red box highlights the 'Existing Customer' button itself. Below the buttons is a 'Required' label. At the bottom of the page are 'Previous' and 'Next' buttons. The footer contains links for 'Contact EDD', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Site Map'.

1. Main

Main

Welcome to e-Services for Business

Select Existing Customer if you are any one of the following:

- An employer who already has an employer payroll tax account number.
- An employer representative/payroll agent.
- An individual/business who is reporting Independent Contractor(s).

Select New Customer if you are:

- An employer and need to register for an employer payroll tax account number. Do not select this option if you are an employer representative or payroll agent.

Existing Customer New Customer

Required

Previous Next

Contact EDD | Conditions of Use | Privacy Policy | Accessibility | Site Map

## Slide notes

To begin this one-time enrollment, select whether you are an Existing Customer or New Customer. An Existing Customer is an employer who already has an Employer Payroll Tax Account Number or is an employer representative/payroll agent.

Select "New Customer" if you are an employer and would like to apply for an Employer Payroll Tax Account Number. If you are an employer representative/payroll agent do not select this option. For this tutorial, we are going to select "Existing Customer" Select "Next" to continue.



The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the CA.Gov logo and the text "State of California Employment Development Department". The navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". The main content area is titled "e-Services Enrollment" and includes a "My Profile" link. The "1. Main" section is titled "Main" and contains a "Welcome to e-Services for Business" message. Below this, there are two sections: "Select Existing Customer if you are any one of the following:" and "Select New Customer if you are:". The "Existing Customer" section lists three bullet points: "An employer who already has an employer payroll tax account number.", "An employer representative/payroll agent.", and "An individual/business who is reporting Independent Contractor(s).". The "New Customer" section lists one bullet point: "An employer and need to register for an employer payroll tax account number. Do not select this option if you are an employer representative or payroll agent." To the right of these sections are two buttons: "Existing Customer" and "New Customer". Below these buttons, there is a red box with the text "Select 'Next'" and a red arrow pointing to the "Next" button. At the bottom of the page, there are links for "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map".

1. Main

Main

Welcome to e-Services for Business

Select Existing Customer if you are any one of the following:

- An employer who already has an employer payroll tax account number.
- An employer representative/payroll agent.
- An individual/business who is reporting Independent Contractor(s).

Select New Customer if you are:

- An employer and need to register for an employer payroll tax account number. Do not select this option if you are an employer representative or payroll agent.

Existing Customer New Customer

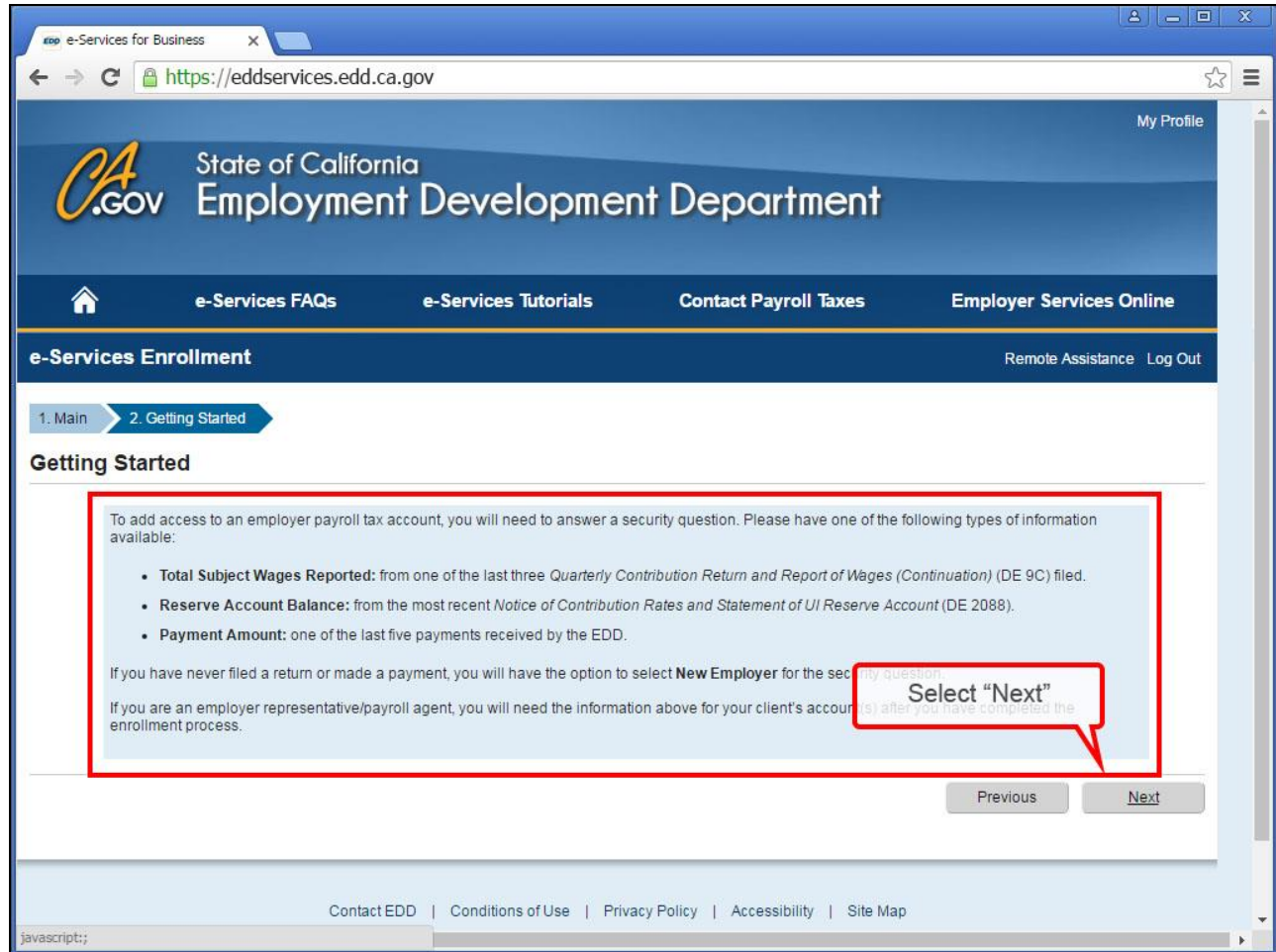
Select "Next"

Previous Next

Contact EDD | Conditions of Use | Privacy Policy | Accessibility | Site Map

## Slide notes

Select "Next" to continue.



## Slide notes

To add access to an employer payroll tax account, you will need to answer a security question. Be prepared to answer one of the questions listed here. Select "Next" to continue.



State of California  
Employment Development Department

e-Services Enrollment

1. Main 2. Getting Started 3. Enrollment Type

**Enrollment Type**

Select "Employer" if you are:

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

Select "Employer Representative/Agent" if you are:

- An employer representative, internal representative (e.g. employee), agent, payroll agent, third-party representative, bookkeeper, accounts payable clerk, or an accountant that represents one or more employers, and/or
- Only submitting the *Report of Independent Contractor(s)* (DE 542).

Type of Enrollment  Required

Previous Next

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### Slide notes

The two types of enrollment are either an "Employer Representative/Payroll Agent" or "Employer." Please take a moment and read this important message. Take time to find out what type of enrollment you want to utilize. This is a detailed explanation of the two choices.

The screenshot displays the 'e-Services Enrollment' page for the State of California Employment Development Department. The page is titled 'Enrollment Type' and shows a progress bar with three steps: 1. Main, 2. Getting Started, and 3. Enrollment Type. The 'Enrollment Type' step is currently active. The page contains two columns of text. The left column lists two options: 'Employer' and 'Employer Representative/Agent'. The right column contains a dropdown menu labeled 'Type of Enrollment' with a 'Required' label. The 'Employer Representative/Agent' option is highlighted with a red box. Below the dropdown menu are 'Previous' and 'Next' buttons. The footer includes links for 'Contact EDD', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Site Map', along with a copyright notice for 2016 State of California.

State of California  
Employment Development Department

e-Services Enrollment

1. Main 2. Getting Started 3. Enrollment Type

**Enrollment Type**

Select "Employer" if you are:

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

Select "Employer Representative/Agent" if you are:

- An employer representative, internal representative (e.g. employee), agent, payroll agent, third-party representative, bookkeeper, accounts payable clerk, or an accountant that represents one or more employers, and/or
- Only submitting the *Report of Independent Contractor(s)* (DE 542).

Type of Enrollment

Employer

Employer Representative/Agent

Required

Previous Next

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## Slide notes

In this example, we are going to choose "Employer Representative/Agent."

The screenshot shows the EDD e-Services Enrollment page. The browser address bar displays <https://eddservices.edd.ca.gov>. The page header includes the CA.Gov logo and the text "State of California Employment Development Department". The navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". The "e-Services Enrollment" section includes a progress bar with steps: "1. Main", "2. Getting Started", and "3. Enrollment Type". The "Enrollment Type" section has two columns of instructions. The left column lists roles for "Employer" and "Employer Representative/Agent". The right column has a "Type of Enrollment" dropdown menu set to "Employer Representative/Agent". A red box highlights the "Next" button, with a callout saying "Select 'Next'". The footer contains links for "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map", along with the copyright notice "Copyright © 2016 State of California".

My Profile

CA.Gov State of California Employment Development Department

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

e-Services Enrollment Remote Assistance Log Out

1. Main 2. Getting Started 3. Enrollment Type

Enrollment Type

Select "Employer" if you are:

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

Select "Employer Representative/Agent" if you are:

- An employer representative, internal representative (e.g. employee), agent, payroll agent, third-party representative, bookkeeper, accounts payable clerk, or an accountant that represents one or more employers, and/or
- Only submitting the *Report of Independent Contractor(s)* (DE 542).

Type of Enrollment  
Employer Representative/Agent

Select "Next"

Previous Next

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## Slide notes

Select "Next" to continue.

e-Services for Business

https://eddservices.edd.ca.gov

My Profile

CA.Gov State of California Employment Development Department

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

e-Services Enrollment Remote Assistance Log Out

1. Main 2. Getting Started 3. Enrollment Type 4. Enrollment

**Enrollment**

**Enter Your Information**

Enter your own information, not your client's.  
An internal representative (e.g., employee) or accounts payable clerk should enter their employer's information.

Type of ID you would like to enroll with

FEIN  
Social Security Number

Required

ID Number

Country

USA

ZIP Code

Required

Previous Next

Contact EDD | Conditions of Use | Privacy Policy | Accessibility | Site Map

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### Slide notes

You have a choice of Social Security Number (SSN) or Federal Employer Identification Number (FEIN). If you are currently a business with a FEIN, you may select it. If you are an individual, you may select Social Security Number. For this example, we select "Social Security Number."

e-Services for Business

https://eddservices.edd.ca.gov

My Profile

CA.Gov State of California Employment Development Department

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

e-Services Enrollment Remote Assistance Log Out

1. Main 2. Getting Started 3. Enrollment Type 4. Enrollment

**Enrollment**

**Enter Your Information**

Enter your own information, not your client's.  
An internal representative (e.g., employee) or accounts payable clerk should enter their employer's information.

Type of ID you would like to enroll with Social Security Number

ID Number XXX-XX-XXXX

Country USA

ZIP Code

Required  
Format: 99999

Previous Next

Select "Next"

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### Slide notes

Enter the ZIP Code related to the FEIN or SSN that you entered. When all fields are completed, select "Next" to continue.

State of California  
Employment Development Department

My Profile

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

e-Services Enrollment Remote Assistance Log Out

1. Main 2. Getting Started 3. Enrollment Type 4. Enrollment 5. Agent Information

Agent Information

Enter Your Information

Enter your own information, not your client's.

Organization Type Individual / Sole Proprietor

First Name Required

Last Name Required

Location Address Required

City Required

State Required

ZIP Code 95814

Country USA

Previous Next

### Slide notes

Complete this page with your own information, not your clients.



State of California  
Employment Development Department

e-Services Enrollment

1. Main 2. Getting Started 3. Enrollment Type 4. Enrollment 5. Agent Information

Agent Information

Enter Your Information

Enter your own information, not your client's.

Organization Type: Individual / Sole Proprietor

First Name: AGENT

Last Name: REPRESENTATIVE

Location Address: 456 ANY ST

City: SACRAMENTO

State: CALIFORNIA

ZIP Code:

Country: USA

Select "Next"

Previous Next

### Slide notes

When the information is completed, select "Next" to continue.

e-Services for Business x

https://eddservices.edd.ca.gov

e-Services Enrollment Remote Assistance Log Out

1. Main 2. Getting Started 3. Enrollment Type 4. Enrollment 5. Agent Information 6. Enrollment Summary

### Enrollment Summary

#### Review Enrollment Request

Type of Enrollment	Employer Representative/Agent
Type of ID you would like to enroll with	Social Security Number
ID Number	XXX-XX-XXXX
Organization Type	Individual / Sole Proprietor
First Name	AGENT
Last Name	REPRESENTATIVE
Location Address	456 ANY ST
City	SACRAMENTO
State	CALIFORNIA
ZIP Code	95814
Country	USA

Select "Submit"

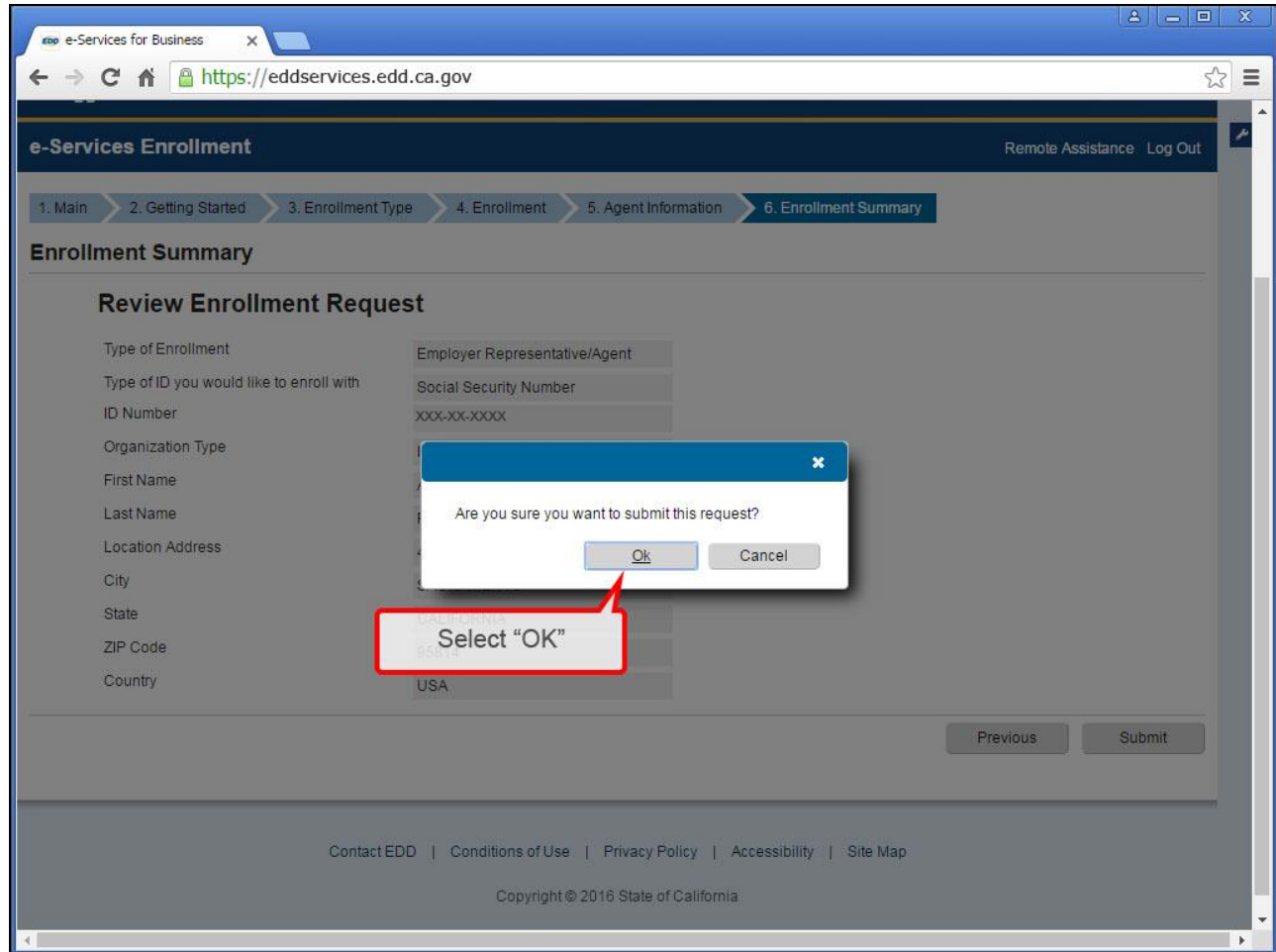
Previous Submit

Contact EDD | Conditions of Use | Privacy Policy | Accessibility | Site Map

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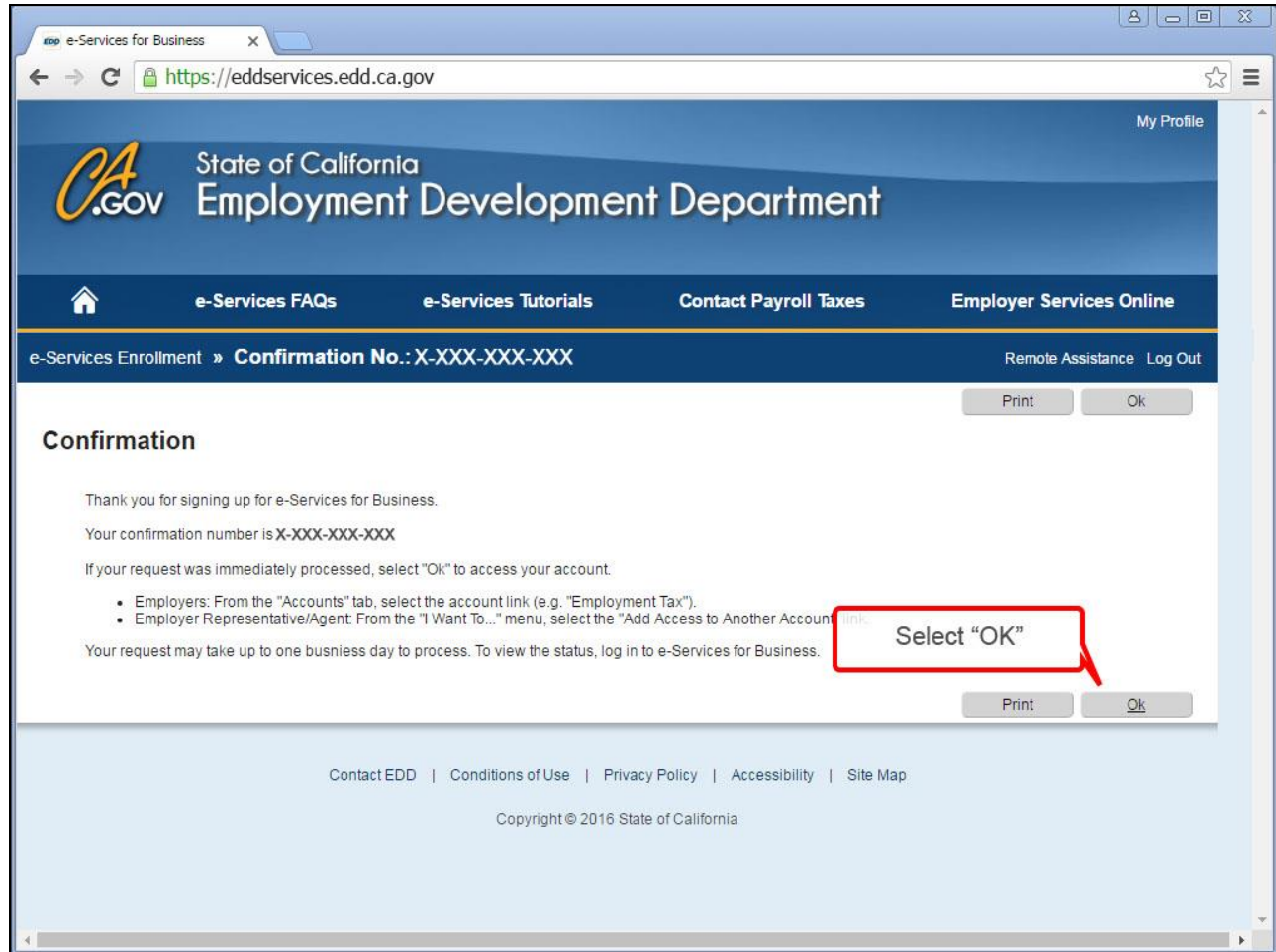
### Slide notes

Now you are ready to submit this request. Select "Submit."



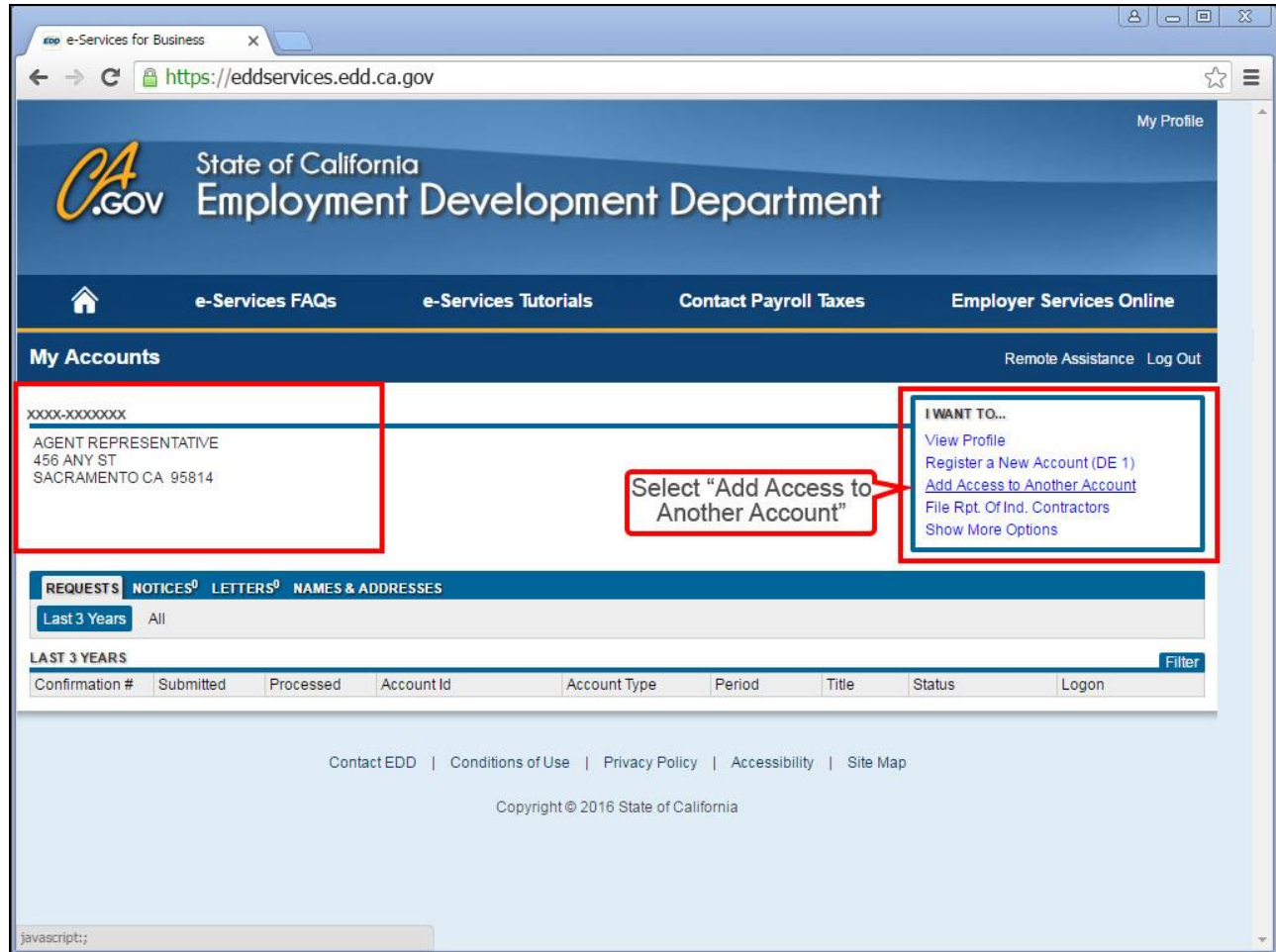
## Slide notes

Are you sure you want to submit this request? Select "OK."



### Slide notes

Here is your confirmation number. Your enrollment request is being processed. Select "OK to continue.



## Slide notes

The e-Services for Business home page screen shows a summary of your enrollment information as the agent. The summary section displays your profile details including taxpayer names and addresses. From the “I Want To...” menu, select the hyperlinks in this section to navigate to windows that allow you to perform the stated action. Select “Add Access to Another Account” in order to gain access to your client’s account. These steps would need to be repeated to gain access for each client account number.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the "CA.Gov" logo and the text "State of California Employment Development Department". A navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". Below this, a breadcrumb trail reads "My Accounts » Add Access to Another Account".

The main content area is titled "Add Access to Another Account". It contains a yellow box with the following text: "To add access to an employer payroll tax account, you will need to answer one of the following security questions."

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of U/I Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

Below the list, a dropdown menu is open, showing the following options:

1. Employment Tax
2. DIEC (DI Elective Coverage)
3. School Employees Fund
4. DIR Collection

The first option, "1. Employment Tax", is highlighted with a red box. A "Required" label is visible next to the dropdown menu.

At the bottom of the page, there are links for "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map". The copyright notice "Copyright © 2016 State of California" is also present.

## Slide notes

Select "Account Type." For this example we select "Employment Tax."



State of California  
Employment Development Department

My Accounts » **Add Access to Another Account** Remote Assistance Log Out

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

Step 1: Select Account Type  
Account Type: 1. Employment Tax

Step 2: Authorization Questions  
Account Number:  
Country:  
ZIP Code:  
Choose a security question to answer: 1. Total Subject Wages Reported  
2. Reserve Account Balance  
3. Payment Amount  
4. New Employer

Required

## Slide notes

Choose an additional question to answer. We chose "Total Subject Wages Reported."

e-Services for Business x

https://eddservices.edd.ca.gov

My Profile

**CA.Gov** State of California  
Employment Development Department

Home e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

My Accounts » **Add Access to Another Account** Remote Assistance Log Out

Search Cancel

**Add Access to Another Account**

To add access to an employer payroll tax account, you will need to answer one of the following security questions:

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

Step 1: Select Account Type

Account Type: 1. Employment Tax

Step 2: Authorization Questions

Account Number: XXX-XXXX-X

Country: USA

ZIP Code: 95814

Choose a security question to answer: 1. Total Subject Wages Reported

Enter the Total Subject Wages from one of the last three Wage Reports: 1000.00

If you have no recall, then enter 0.00 for your total.

## Slide notes

Select "Search" to continue.

e-Services for Business

https://eddservices.edd.ca.gov

### Add Access to Another Account

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

Step 1: Select Account Type

Account Type: 1. Employment Tax

Step 2: Authorization Questions

Account Number: XXX-XXXX-X

Country: USA

ZIP Code: 95816

Choose a security question to answer: 1. Total Subject Wages Reported

Enter the Total Subject Wages from one of the last three Wage Reports: 1000.00

The account number you are trying to gain access to is XXX-XXXX-X. Click Submit to add access to this account.

Select "Submit"

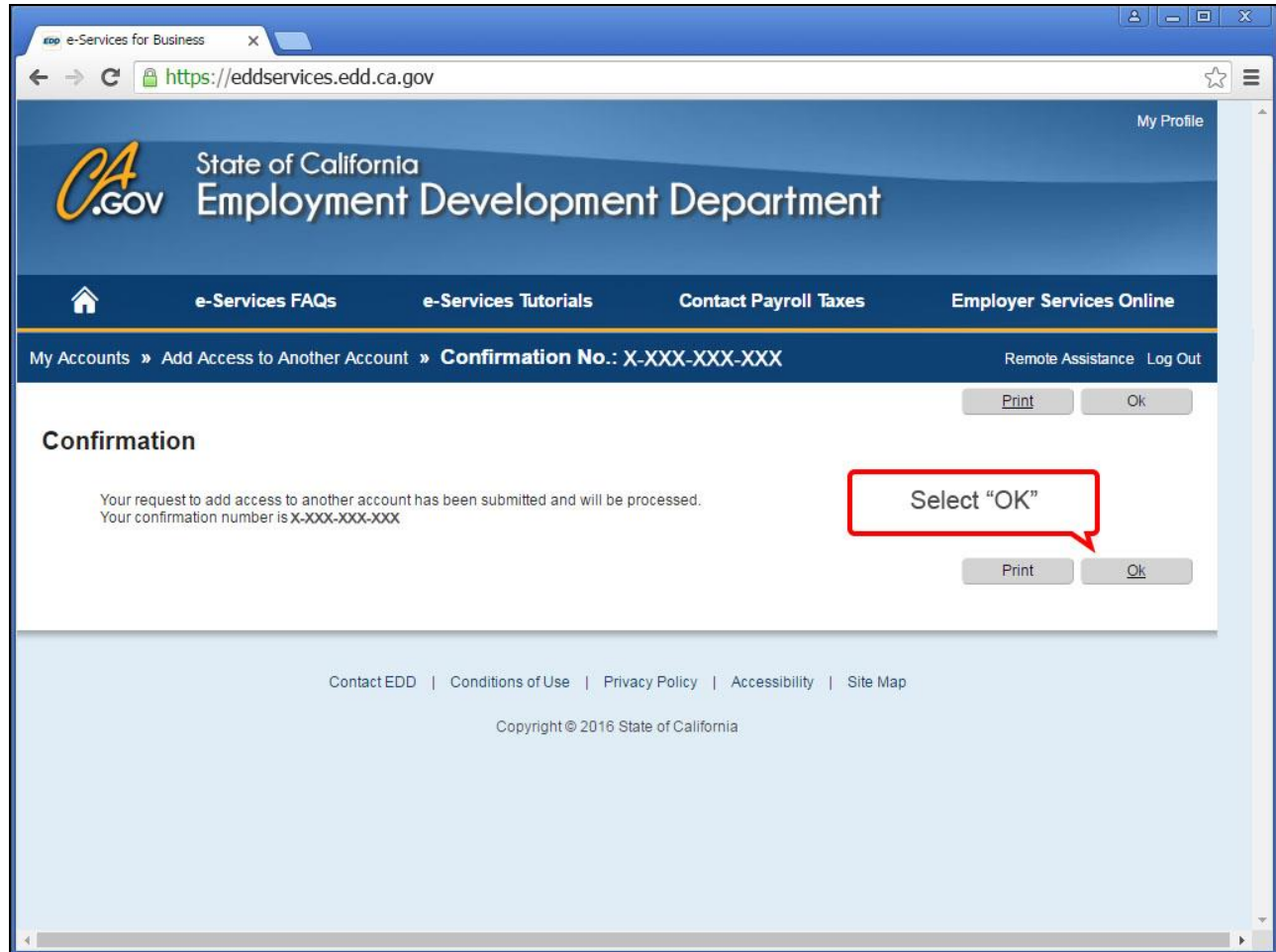
Submit Cancel

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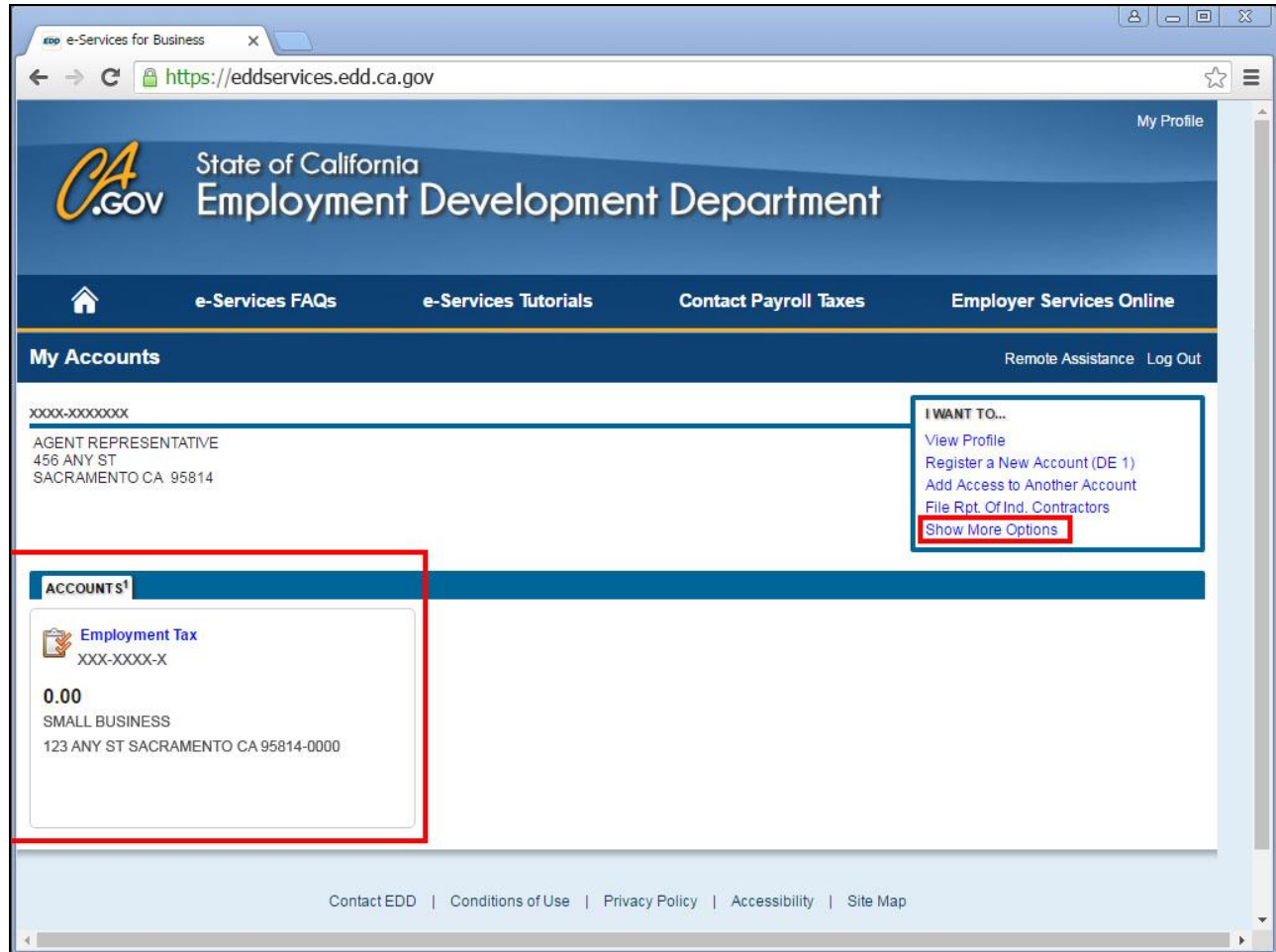
### Slide notes

The message at the bottom informs you that you are trying to add access to the specified account. Select "Submit" to add access to this account.



### Slide notes

The request to add access to another account has been submitted and will be processed. Select "OK" to continue.



## Slide notes

As you can see, we have added access to this account. It is located under the “Accounts” subtab on the home page. There are many other actions on the home page that an employer representative or payroll agent may find helpful for managing multiple accounts. Most of these actions can be accessed by selecting the “Show More Options” hyperlink in the “I Want To...” menu.

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Other Resources  
[www.edd.ca.gov](http://www.edd.ca.gov)

Taxpayer Assistance Center  
1-888-745-3886

**Slide notes**

Thank you for taking the time to watch this tutorial on how to enroll and navigate through e-Services for Business as an employer representative or payroll agent. Be sure to view our other tutorials demonstrating how to file bulk returns, make bulk payments, and the many other actions available in e-Services for Business. Other resources are available at [www.edd.ca.gov](http://www.edd.ca.gov) or by calling the Taxpayer Assistance Center at 1-888-745-3886.